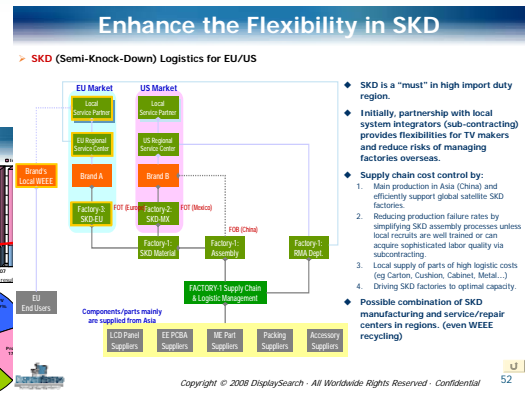
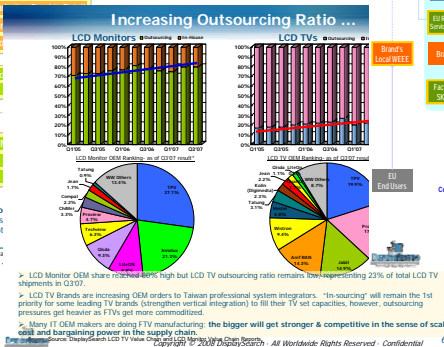
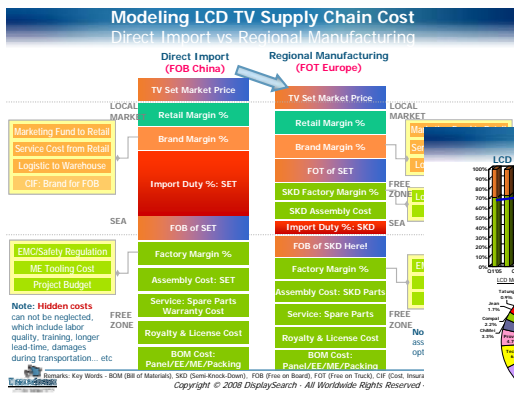


DisplaySearch Topical: Global LCD TV Supply Chain Analysis & ODM/OEM Opportunities



- **Executive Summary** **slide 4**
 - Addressable Growing Market in FPDs
 - Fighting Commoditization in FTV Market
 - A Streamlined TV Supply Chain is a Must

- **FTV Supply Chain Evolution** **slide 13**
 - TV Supply Chain Margins
 - FTV Supply Chain Evolution
 - Integral Supply Chain Cost: LCD/ PDP TVs
 - Survival Kit: Supply Chain Efficiency & Management

- **LCD TV Supply Chain Cost Analysis** **slide 21**
 - LCD TV Cost Tear Down: Fixed Costs
 - LCD TV Cost Tear Down: Variable Costs
 - Modeling LCD TV Supply Chain Cost
 - Modeling Direct Import vs. Regional Manufacturing Costs
 - Supply Chain Cost: Direct Import to US vs. Manufacturing in Mexico
 - Supply Chain Cost: Direct Import to EU vs. Manufacturing in Poland
 - Supply Chain Cost: 5% Import Duty on Panel

- **Integral Supply Chain Cost Optimizations****slide 35**
 - Integration in LCD Panel & TV Manufacturing
 - Shortening the Supply Chain: The Fast Beats the Slow
 - Regional Module and TV Assembly
 - ODM/OEM Makers Global Manufacturing Sites
 - Complexity in TV Supply Chain, Different Ways of Working
 - Enhance the Flexibility in SKD
 - SKD (Semi-Knock-Down) Logistics for EU/US
 - CKD (Complete-Knock-Down) Logistics for EU/US
 - From SKD to CKD... For Larger Scale
 - Design for Manufacturing, Cost and Service: Integration
 - Design for Manufacturing, Cost and Service: Accessory & Packing

Outline (continued)

- ODM/OEM Opportunities & Risks slide 51
 - In-House or Outsourcing?
 - Vertical Integration Overview: Top 5 FPD Market Players
 - Increasing the Outsourcing Ratio ...
 - LCD TV Outsourcing Status & Future Outlook
 - Taiwan ODM/OEM LCD TV & LCD Monitor Shipments & Business Plans
 - Global LCD TV ODM/OEM Business Outlook: Customer Portfolio
 - SWOT Analysis: Taiwan FPD ODM/OEM Industry
 - TV OEM Opportunities & Risks

- Appendices slide 68
 - LCD TV Product Specification Assumption for Cost Model
 - Components/Parts Import Duty in EU

Important Notice

Copyright ©2008 DisplaySearch, LLC an NPD Group Company

- This is a sample report. Contact us for more information and pricing at
 - DisplaySearch
 - Telephone: +1.512.459.3126 Option 7
 - Email: info@displaysearch.com
 - www.displaysearch.com
 - 1301 South Capital of Texas Highway • Suite B 125
 - Austin TX 78746 USA

- Complete contact information including addresses and phone numbers is available at <http://www.displaysearch.com/contact/>.

- DisplaySearch authorizes you to access and view these presentation materials. You may not modify, publicly disseminate, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer or sell these presentation materials or any portion(s) thereof without prior written consent from DisplaySearch. Excerpts for editorial use must be accompanied by proprietary notices contained in the original materials and appropriate attribution of DisplaySearch or of the source of the original materials, as the case may be, and prior written consent from DisplaySearch must be obtained. To obtain such consent, contact info@displaysearch.com.

- DisplaySearch makes no representations about the suitability of the information contained in the materials or the website for any purpose.

- All materials are provided "as is" without warranty of any kind.